H1N1 CRA Weekly H1N1 Vaccine Doses Administered Update Webinar Transcript

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1:00 pm CT

Coordinator: Welcome and thank you for standing by. At this time all participants are in a listen-only mode. During the question and answer session you will be prompted to record your name by pressing star 1 to ask a question. Today's conference is being recorded. If you have any objections you may disconnect at this time.

Now I will turn the meeting over to Ms. Jeanne Tropper. You may begin.

Jeanne Tropper: [1]Hello everyone. Thank you for joining us for this Weekly Vaccine Doses Administered Update meeting. [2]We're just going to do our usual background and then give you some updates as to where we are terms of the ordering beginning soon.

We also want to talk in some detail about the DESL which is the Data Entry Specialist Lite user enrollment process that we have as an alternative for those who want to be able to access the system to enter aggregate information without having to use the digital certificate.

We’ll also go through some training for each of the options. Charles and Tony will be facilitating that. We'll talk about some action items and then open up for questions.

[3]So just again, as a refresher for those who may be new to the call, as you know the National Strategy for Pandemic Influenza Implementation Plan calls for monitoring appropriate use of scarce pandemic influenza vaccine.

To accomplish this, states and Project Areas will track vaccine doses administered. They'll collect and aggregate a minimum data set and send that information to the CDC.

And that minimum data set will work together with a number of different organizations to define. And then the system that will support that effort is the CRA system which has been modified to provide three different ways for reporting that. And again we're going to be training on that later in terms of each of the options.

[4]But just starting from the top, Option 1 relies on data collection at the state level. So the individual patient level information is collected within an immunization registry or other system. And the subset of data is extracted and is sent to the CDC in three different formats at the choosing of the Project Area. And then that is accepted and calculated here at CDC.

Option 2 is the direct Web entry. And that is the ability to answer aggregate information directly via the Web using a standard Web browser. And that can be done at the state level or it can be done at a regional or clinic level.

And then Option 3 for those who may want the system to support the individual data collection can be used at the point of administration. And then we will automatically calculate the count.

[5]So as everyone knows, the H1N1 has been declared an emergency and a pandemic. And as such the pandemic plan has been applied to the H1N1 response of course specifically customized to support H1N1.

The CRA application will be used to track doses administered. It's a very critical component of safety in ensuring that we're meeting the targeted groups.

And rather than tracking using the HHS priority groups we have established, we will be tracking according to age groups. And Tony will show you that when he gets to the demo.

CRA is used at the beginning when there is little information. And so it can provide relatively current information. In parallel though, we will have other systems that traditionally are used during seasonal influenza to assess coverage. Those will be running in parallel.

And as we move through the vaccine campaign those will become more and more accurate and we will eventually move to statistical methods for assessing vaccine coverage.

[6]So moving on, just a couple of updates. Everybody's probably aware that the vaccine ordering is targeted to begin on September 30. And so we're expecting that we'll begin to report possibly as soon as October 6, likely October 13 as you'll begin to get information.

There is expected to be a small amount shipped out right away and then a larger amount to follow thereafter. So we'll just have to monitor that.

[7]One of the big things I wanted to talk about is the security waiver. One of the things that we've been communicating with you all over the last couple of years on this whole effort is: what are some of the areas that are challenging? And we identified that access to the system using a digital certificate sometimes causes a barrier.

And recognizing that this vaccine campaign is going to need the support of non-traditional vaccinators, OB/GYN, private physicians, et cetera because of the resource constraints at the state and local levels, we recognize we need to give Project Areas the ability to access the system a little bit more easily than having everyone use a digital certificate.

With that, and we were able to get a security waiver that would support access via the system using username and password authentication to access the application.

And that's the Data Entry Specialist Lite role which we'll talk a little bit more about and show you. This will be the only role that will be allowed to access using only username and password.

And they'll have more limited abilities that can certainly enter information, both the aggregate and the detail. However in the detail they're not able to access prior records. It's only in the session that they're in.

So it's probably most useful for Option 2 users. And that's exactly what we're trying to support. We're trying to give you options and methods to allow some of the non-traditional providers access perhaps directly into the system as opposed to relying heavily on manual methods. Again that would be up to the states to determine.

Ulrica Andujar's going to talk us through this process, and we have created a guide for establishing a Data Entry Specialist Lite document. And has that been emailed and we are working on posting it on the Web site. We have to work on the 508 compliance, so as soon as that's ready we'll let you know.

Okay, so I'm going to kick this over to Ulrica to walk us through what the process is going to be.

Ulrica Andujar: [8]Okay thanks Jeanne. As Jeanne just mentioned, I'm going to go over the steps for adding the new DES Lite (Data Entry Specialist Lite) user role in CRA.

As Jeanne also mentioned, the guide for establishing CRA Data Entry Specialist Lite for H1N1 has been sent out to the CRA points of contact for the Project Areas. And you should have received that in the notification for today's Webinar from Charles Williams.

So the first step for adding a DES Lite User into the CRA system is a PHA that already has a digital certificate and is the PHA for the intended Project Area will access CRA via SDN to add a new user.

For those PHAs that are not the point of contact in the Project Area, the point of contact will need to be in close communication with the identified PHA to make them aware of this process and to also let them know of the steps that need to be taken to get the new DES Lite users into the system and get them access to the new user role.

And also I will be showing a couple of screenshots of the SDN page which the PHAs will access as well as screenshots of adding a new user.

For those that have gone into CRA before to add a data entry specialist that would receive a digital certificate, the process is very much the same, you would just select a new user role. But nonetheless, I will show a couple of screenshots and you will be able to see that later on on adding a user when Tony does some of the overview.

And so once the PHA logs into CRA via SDN to add a new user, they will go through to the navigation which will be system set up and add a new user.

And at that point they will enter a valid email address for the Data Entry Specialist Lite user that they intend to add.

At this point they would be presented with the Add User page and there they would enter the required fields at a minimum. And those required fields are first name, last name, and phone number.

Once these required fields have been entered and any additional information that you'd like to add such as address, city, state, supplementary information, the PHA will then assign the Data Entry Specialist Lite role.

Once they’ve identified the Data Entry Specialist Lite role they will then select the assigned resources to User button which is at the bottom of the page.

Again I'm going to show some screenshots. But these first three steps that you see here on the screen are pretty much similar to the way you would already add a Data Entry Specialist. But nonetheless I'd like to go through them just so you know the full process.

So once you assign, click the Assign Resources to the User, the PHA will then identify which clinics or organizations -- and they're identified in CRA -- to which this DES Lite user would need access to.

At this point once the DES Lite users have been added into CRA the Public Health Administrator will be receiving an email from the CDC PHIN help desk to verify this DES Lite user.

The PHA will need to verify the identity of this new DESL user. And from that point the CDC security team will send the new DESL user two emails.

The first email will contain a link to the CRA authentication site and their username which will be the email address that the PHA entered when they were adding the user. And then the user will receive a second email which will contain their password.

So one of the crucial tasks aside from getting the users into the system will also be for those PHA's to verify these users.

And so to get to the part where the DESL user can access this site with delimited functionality, the PHA will need to verify that this user has access.

And so if this could be done in a timely fashion that will of course, move things along very quickly.

And so once the PHA has verified the user, the new DESL user will receive these emails at the email address identified earlier. And then they'll be able to access that site.

[9]And so now I'll show you a couple of screenshots. So this is the SDN access page where the PHA would log in. They would enter their challenge phrase and access the CRA application.

[10]This is a screenshot of the initial step for adding the email address. As I mentioned earlier you will go through System Setup and then Add User and this would be the first screen that you're presented with.

So on this screen the PHA will add the email address for the DES Lite user that they would like to enter into the system.

[11]And this second screen here is where you would enter their username information which I identified earlier.

As you can see, the required fields are first name, last name, and phone number down in the contact section.

For email address you will see the email address that the PHA identified on the previous screen and of course some other supplementary fields for which the PHA can enter information for that user.

At the very bottom section you'll see user role. And the fourth role there is the Data Entry Specialist Lite. And this is the role that the PHA will select for their Data Entry Specialist Lite users.

Once they've selected that button they will click the Assign Resources to User at the bottom of the page. And then they would be presented with the Assigned Resources to User.

[12]And so at this point all the PHA would need to do is select those organizations or clinics for which they would like the Data Entry Specialist Lite to have access to and to potentially report counts. And then they would click Save and those organizations would be assigned to that user.

Again at this point once the user has been entered into CRA, then the PHA will be contacted by the PHIN help desk.

Again it's very imperative that the PHA get back and verify that the user identity is valid and they would like for this individual to have DES Lite access to the authentication site.

And then moving forward that user will receive those two emails, the first one providing the link to the site as well as their username and then a follow-up second email which will provide their password.

And again you'll be able to see these last two or three screens during Tony's demo because it's pretty much the same as a regular Data Entry Specialist.

Jeanne Tropper: Ulrica, this is Jeanne. I have a question. For the PHA to validate the user is it just to respond to the email or are they going to get a telephone call?

Ulrica Andujar: They're going to get an email.

Jeanne Tropper: Email, great. Wonderful.

Ulrica Andujar: And with that I will turn it over to Charles for the overview.

Charles Williams: [13]Okay thank you Ulrica. Before we begin our training for the three options to submit data to CRA, we just have an overview of the setup task required for using CRA.

CDC has setup the H1N1 event with the minimum data set including the vaccine types, aggregate groups and Project Areas.

But we want to go through some of the basic setup steps that may be required for some Project Areas that include adding users, organizations, and then for Option 3 users, optional fields.

So now Tony's going to give a demonstration of some of the basic setup tasks for CRA.

Tony DaSilva: Thank you Charles. I will demonstrate adding organizations and users at this moment. And then at the end of the Option 3 training I will return to a sub task and talk about optional fields and just sort of fits in the overall process.

So let me bring up the application. I'll need to login. I’m going to login as a PHA user.

Once the system authenticates me I'm presented with the Home Page or landing page of the CRA application.

And where I want to go to next is the Systems Setup option. And the first thing I want to show you is the process for adding an organization. So to do that I will click on Systems Setup. I'll click on Add Organization.

And I'm presented with the Add Organization page. You'll recall the red carets in the required fields. And since we've logged in as a PHA from the state of Oklahoma the jurisdiction displays by default on that setup.

And I'll enter the name of the organization. I'll choose an organization type. And then I'll enter an address and my zip code. And last, I need to enter a telephone number.

Once I have the basic contacts and address information down, I need to choose the organizational function. For our purposes here I'll choose Administration Clinic. And then lastly we'll click Save to save our information.

The system accepts our data entry, indicates that the record was created. And we need to do one more thing.

We need to assign this organization to the event that we're working with. So I'll expand the Events option at the bottom of the page. And I'll click on the link assign Organizations to Events.

And then from here I have a list of all the organizations available to me. This is my training system. So I've got some additional events here that we're working on.

So likely when you're working with the system you'll only have that option, Novel Influenza. So you'll choose that and click on Add to move it over to Selected Events. And then lastly we'll click Save to save our information.

And if we expand events again, you'll see that our event is now assigned to this particular organization.

That's the process in a nutshell. As you can see this is very limited data entry that you need to do so as to create an organization.

The next thing I will do is demonstrate how to add a user to the system.

As you recall, there are two types of users that CRA supports, Public Health Administrators (PHA) and Data Entry Specialists (DES). And now we have the additional user, the Data Entry Specialist Lite.

And the PHA is assigned to the jurisdiction, has access to all the data in his or her jurisdiction and is responsible for entering setup information and also for data entry on tasks.

The DES is assigned to the organization and has access only to the assigned organization and is responsible for entering provider level aggregate count information.

So let's look at the process for entering a user. And we go back to the Home Page just to clear the cobwebs out. I'll click on Systems Setup. And now I'll click on Add User.

And just as we saw a few moments ago when Ulrica was demonstrating the DESL or the DES Lite process, you'll see the email on address information displayed first.

So we’ll enter an email address. I'll click Next. And then just as you saw before, the user information displays. So I'll need to use just some very basic information about my user.

We have address and additional information here, but for our purposes we'll just stick to the required fields. And I'll enter a work phone. And then I need to enter a password.

And then the last thing I need to do is enter my user role. You'll see all the user roles available to us. For our purposes here I'll click on Data Entry Specialist. But we want to make a note about our Data Entry Specialist Lite based on the process that Ulrica suggest on outlined for you.

The two things that we won't see here are the password and verify password fields. When you're working with that the process for entering a Data Entry Specialist Lite user you won't have access to that. That simply won't display on your screen.

Jeanne Tropper: Tony, just to make sure you clarify that this is what the off-line version would see. But normally password would not be entered on in the online version. This is only for off-line version.

But on the online version -- which is what the majority of people are going to be using -- they would not have to enter the password or verify the password.

Tony DaSilva: That's an excellent point. Thank you so much.

The last thing I want to do to close out this process is to assign my resources to this particular user. So I'll click on the Assign Resources to User button.

And then from here we'll choose our jurisdiction. And then we'll see that we have our organization. And then we'll click Save. And the system will give you a prompt at the very top of the screen indicating that your user was created.

You can scroll down and it will just give you all of the organizations that our user has access to.

You'll notice that there’s a Delete button here. It's important to note that in case you have staff changes you’ll want to be able to go ahead and either change passwords or delete that information. So that available to you as well. So keep that in mind as you're working with your users.

And that ends the process of adding a user. And as I said, I will continue with the additional setup process at the end of the Option 3 training.

I'll turn it back over to Charles.

Charles Williams: [14]Thank you Tony. We are now going to the actual training for our three options.

[15]But before we get into the training demonstrations we want to give a few guidelines for reporting aggregate data through CRA.

First of all, each Project Area sending data to CRA is responsible for submitting counts for each of the reporting periods, the aggregate counts for these reporting periods as far as doses administered is concerned.

And these are the counts for all clinics within a jurisdiction which would be by age group and by dose number.

Then also the reporting that's required for each reporting period. So if there’s a reporting period where nothing was administered then you'd still for that week report zeros for that week.

And of course our reporting period is based on an MMWR week which is defined as Sunday through Saturday. And then the reporting is required by the end of day which is 11:59 PM of your respective time zone on the Tuesday following the end of that particular reporting period.

[16]So for Option 1 which is our data exchange, guidelines for reporting aggregate data to CRA. First of all the primary code is 128. This should be used to report the aggregated age group and dose number to CDC. And so this is for any formulation of the H1N1 vaccine that has been administered.

So again, 128 is the primary code to be used in your data file for Option 1. And then also there is a full replacement of aggregate report.

And the full replacement is that the region report count from the previous week and the new week are required for each reporting period.

This is again, the new week plus the counts from the previous week are to be reported in each of the data files when you submit them on the Tuesday following your reporting period.

And the aggregate counts will be replaced based on a match to the partner, events start date, end date and the vaccine type.

[17]So for our training we have a scenario where the data has been collected in the Project Area via an existing immunization information system or other application. And aggregate counts are manually uploaded to CRA for the reporting period. And now Tony will demonstrate this for you.

Tony DaSilva: Thank you Charles. Let me bring up the application and I want to login.

And once I login to the system I'm presented with the Home Page. And I'll need to upload my file. And it's probably a good idea if I bring up that file, so just give me one moment, I'll bring it up so we can look at the details of this particular file.

So we have an XML file containing dose and age information. And you'll see if you're familiar with the specification, you'll be familiar with all the options available here.

So what I want to do is add these counts to my application. So let me bring back CRA.

To do that, I'll click on the Data Collection option. And I'll scroll down and choose Upload Aggregate File.

From here I have an option to browse my file, so I’ll click on the Browse button. And here it is on my desktop. I want to select that and the path displays on that text box. It's just a simple matter of clicking the Upload button.

CRA will process the file and consume it. And once the upload is complete you will receive an email detailing the status of your upload.

And when you're online you'll also notice the View Upload Details link. If we click on that link we can see the various options that are available here. We’ll see the upload information at the very top. It gives you some details on this particular file including the upload ID. That's a good number to keep in mind in the event you're searching for a particular file.

You'll notice it says it’s Completed and we've got that our aggregate is successful. And then we also have at the bottom of the page a list of errors and warnings. Let's talk briefly about that.

CRA will consume your file and based on the contents will accept it or reject it. If the file is rejected it's because there is an error in the file. And so you'll have a notice indicating that failure.

If there is an issue with your file that will not result in the file being rejected, that issue will be displayed as a warning. And you'll see here at age 1, 2, 4, 5, 6, 7, and DS 2 and 3 are missing.

And so you'll recall we saw the files just a moment ago. The only information that we put in are the counts that we actually have numbers for. That is certainly allowed by our specifications. So the file is correct. And as you can see it was successfully uploaded.

That is the process of uploading a file. It really is that simple. If you have any issues with that, the first thing to check obviously is the contents of your file making sure that it's been according to the specifications.

Ulrica asked me to also mention PHINMS. That is certainly the other option for transporting this file via the PHINMS transport system.

If that's the case, you certainly won't be going through this manual process here. Obviously that's a little bit difficult for us to demonstrate here at this point.

But again, if you have any questions regarding that, please feel free to contact me and I'll do my best to assist you.

I'm going to turn it over to Charles.

Charles Williams: [18]Okay thank you Tony. We will now go into the training for our Option 2 users. Guidelines for reporting aggregate data through the Option 2 which is when you're entering directly into the Web based application. You're entering the aggregate counts.

Vaccine type is **Novel Influenza-H1N1-09, all formulations**. This should be used to report all aggregate age group and dose number to CDC.

So when you go into applications and you go to the drop-down, please remember to use all formulations to report your data to CDC.

[19]Some process and technical considerations for Option 2. First, when looking at the process considerations the Project Area or the state must first determine how the data will be entered into CRA. And you have the two different ways.

You have the aggregate data submitted at the Project Area or state level only. Or you can also do it where the data is submitted at the provider level and then confirmed at the Project Area level.

And once you have decided which way the data will be entered in CRA then you will need to determine who will need access to CRA and what role they will actually need to be assigned.

And there are some technical considerations. First the staff entering data online must have access to the Internet via the Web, a Web browser. And then a staff confirming data for the Project Area which is a Public Health

Administrator must have an SDN digital certificate to confirm the data that has been submitted to CRA.

[20]So for training we have two scenarios that are actually the two different ways the data can be entered into CRA for Option 2.

Scenario one is where the Project Area confirms and submits the count. This is where the data is collected at the provider level and in some way the information is sent to the public health authority and aggregated at the Project Area level.

Then the PHA logs into CRA and submits the confirmed aggregate data for the Project Area. And this again is done at the Project Area or state level.

Then we have scenario two where the providers enter the counts and then the Project Area confirms the counts at the Project Area level. Data is collected and aggregate counts are entered directly into CRA at the provider level.

And then the PHA comes in, logs in at the state level and then confirms the counts for the Project Area. And so now Tony will demonstrate this for you.

Tony DaSilva: Thank you Charles. I'll log in again. First thing I'm going to demonstrate is the first scenario, where the Project Area enters and confirms the counts. So I'll log in as a PHA.

Once again, I access the application. I can do all of my work in a single screen. To do that I'll click on Data Collection. And I'll click on Confirm Aggregate Report. I'll need to choose the Aggregate Report information first.

So in this instance I'll choose the event and then a vaccine and reporting period. End date will display. For our purposes here I'll just back out and choose something a few weeks earlier. And I'll click on Next.

So here we are with the Confirm Aggregate Report page. You'll see all of the vaccine type information is displayed here. And as Charles says, the one that we need to concentrate on for our purposes here as Option 2 users are the all formulation types. It's a simple matter of us clicking on the Confirm button.

And once the pop-up window displays and I'll try to make that a bit more visible for us, it's a matter of us entering our age group information and our dose information.

And you'll see as I enter information in here for each of these ages the total at the very bottom will continue to increment.

It's important that we make sure that our totals for our various age groups also match with the total for our confirmed count. So for our purposes here we'll put 2000 for our first dose and maybe 1000 for our second dose. And then you'll see the totals match up top and bottom.

Once you're satisfied you have all your information you can just click on the Confirm button and you'll see that your confirmed count displays there.

That is the process for entering aggregate counts from the Project Area level. I want to now demonstrate to you the process for entering accounts from the provider level area and then confirming them at the Project Area level.

So let me log out of the system. So on this second scenario the data is collected and aggregate counts are entered into CRA at the provider level.

And then at some point before the reporting deadline the PHA will log into CRA and they'll confirm the aggregate data for their Project Area.

So let me login. I'm going to login as a DES user. All right, I'll need to choose Data Collection and Report Aggregate Count.

I'm presented with the select aggregate count information. And based on all of my login details the various items of information here are already presented for you so it's just a simple matter of clicking on the Next button.

Then we need to enter our information for our counts, our age group and our dose number. So we'll start by entering our reported date. And again, let me back out. And I'll choose 7-18 as my report period end date.

I'll need to choose my vaccine type. And again we focus on all formulations for Option 2 data entry. And then we enter our age group information.

It's critical here that we remember to enter our zeros for our zero counts. I'm notorious at forgetting to do that during training so luckily I have all these good folks here to remind me.

And as you saw before as you enter your information, the totals increment to the bottom of that list. Again we want our dose number and age group counts to match. So we’ll enter our dose numbers.

So there's my zero. It's not a training unless Tony forgets to enter a zero. And you'll see that my numbers match.

Once I'm satisfied that I have all my information I'll click on Save and Add Another. The system will accept my data entry and you'll see the blue message at the top of the screen indicating that my aggregate report was saved.

So now I'm coming to the end of the reporting period and I'm a PHA at this jurisdiction and it's my job to confirm all of the other reports have been sent in. So I'll log out here and demonstrate that by logging in as a PHA.

And I'll click Login. And I'm presented with the Home Page in the system. And as I showed you before in our first scenario we'll need to confirm this information. The process is more or less the same but in this instance we'll have our numbers presented to us.

So I'll click on Data Collection. I'll choose Confirm Aggregate Report. My jurisdiction displays by default.

I'll need to choose my event information and make sure that I pick proper week. I'm going to pick the 18th. Click on Next. And you'll see my counts are there.

And from here I click on the Confirm link. You'll see all my counts are displayed here. And if I'm satisfied that those are correct I'll click on Confirm.

And as I showed you earlier, the screen confirm checkmark displays on the all formulations or vaccine type and our count is there.

If you come to a situation where you may need to make some additional changes, maybe you received some counts for a previous week that you weren't able to put in by the reporting deadline, you have the option to replace those counts. The Replace link displays here.

If you click that you'll be presented with a page giving you the opportunity to enter your counts for replacing. And for our purposes here I will just cancel out of that.

And in the actual world we're not going to immediately replace as we enter. We're going to be in a situation where we need to search for our reports. So let's do that so we can see how that would work in the real world.

Bring us back to the Home Page and say I'm interested in searching for my previous report because I've received some additional counts that I want to enter.

To do that I'll click on Data Collection. And I'll click on Search Aggregate Reports. And one of the good things about the CRA application with regards to searching is that searching works the same regardless of the type of information you're looking for.

You're presented with a Search page and it has a number of search criteria in there. And it's up to you to find the information that you want.

For our purposes here I'll just click on Search. And we see that I have the report that I just entered here. And it was the 18th, yes. And we'll click on that Report Date link and it will display.

And just as you saw earlier in that little pop-up window, that information is all contained within this Replace page. And it's a simple matter of me making the changes I want.

Perhaps I miscounted my data entry here. Let’s just change that and you’ll see my counts match up. And it's a matter of me clicking on the Replace Confirm Report button. Once I do that I'll be prompted to click Okay. I'll do that and my replace will be displayed there.

That brings me to the end of the Option 2 training. And I will turn it back over to Charles.

Charles Williams: [21]Okay thank you Tony. Now we’ll go into our Option 3 training and the guidelines for Option 3 which is a Web based detail option. First, all vaccine types can be used to track the vaccine doses administered.

And also individual vaccine and lot number information can also be collected using Option 3.

[22]So then processing consideration for Option 3 users. We first need to determine who will collect and enter the data for the Project Area and then determine the level of detail of vaccination data that needs to be collected.

Then ensure that the data entry staff or users and the providers have been added and assigned to the actual H1N1 event.

And then some technical considerations include of course the staff entering the data online must have access to Internet via Web browser unless they are using off-line CRA.

And for those who are using off-line CRA there are separate trainings to be held for those Project Areas.

And then also staff access and CRA must have an SDN digital certificate.

[23]So our Option 3 scenario, the patient level vaccine doses administered data has been collected at the provider level and then entered into CRA.

The CRA aggregate this patient level data entered by age group and dose number. And then the PHA logs into CRA and confirms the aggregate data for the Project Area for that particular recording period.

Tony DaSilva: All right, I'll bring up the application. And the first thing I want to do is login to the system as a data entry specialist. And I will add a patient with countermeasures using our Rapid Data Entry screen.

So let me login. And once I'm authenticated I'm presented with the Home Page of the system. And now I'll need to enter my patient detail information.

I'll do that by clicking on Data Collection, Add Patient Countermeasures. I'm presented with the Add Patient Countermeasures page. And it might be useful if I can expand this window a little bit.

You'll see at the top I have some patient information -- first name, last name, gender, date of birth. And at the bottom I have my specific countermeasure information.

All of these fields are customizable by the Public Health Administrator. And we will demonstrate those optional fields in just a few moments.

But before I do that let me go ahead and enter this data. So I'll enter. And choose your gender, and the birth date. And you'll notice as I enter the birth date or year, the age group information at the bottom of the countermeasure information section of our page is automatically calculated. That saves you a few seconds of data entry.

And then from here it's a simple matter of me choosing my administered date. Often you'll simply accept the default date. But for our purposes here I'll back out a little while.

I want to back out a little more. And then I'll choose my vaccine product. Here I have additional options: the injectable, nasal, and the preservative free. For our purposes I'll choose Injectable.

Now that follow-up date field is an artifact from a previous training so we'll just skip that for now. And the last thing I want to do is enter our dose option. So I'll choose the first dose.

And then I'll click Save and Add Another.

Once the system accepts my data entry it will prompt me with the information that my record was created. It will clear out all of my data entry except for some of the other options that I selected, specifically here our administered date and our vaccine product. And this puts us in a position where we can immediately enter some more addition data. So I'll just continue with some data entry here, just add another one.

Oh, thank you Ulrica. And I'll add one more here. And then I'll choose my dose number. And then I'll click Save and Add Another Patient.

Ulrica Andujar: Are you going to show the follow-up?

Tony DaSilva: Yes, but as I said, that's an artifact from a previous training that I just failed to clean up. So I will definitely go ahead and do that.

Once I enter my information you'll see that my patient record was created.

I want to bring your attention to the View Recently Added Patient button. If we click this link, we will be presented with a list of all the patients, the last 20 patients that we've entered on during our session.

And it gives us an opportunity to go in and make any changes if we need to. And to do that we simply click on the patient's record, by clicking on this Edit Page button.

And then we’re presented with the Edit Patient page and the three tabs that contain all the patient information.

You'll notice that there are several additional fields here that weren’t displayed on our previous data entry page.

We have the option of controlling which fields are made available to the users at that initial page. But then all the additional fields that come out of the box at CRA are displayed here. And we can go ahead and enter information as we need to.

But click on the Countermeasure links. You'll see the countermeasure information displayed here. I have an opportunity to enter an adverse event if that's necessary.

I can click on the Edit link to make some changes to the countermeasure information I just entered.

And then lastly I have the follow-up information. Since I've set this thing up for follow-up, I have the ability to choose a contact method, follow-up dates and things of that nature here. But as I said this was again an artifact of a previous training.

Jeanne Tropper: In a way this would be used obviously and for the vaccine campaign. It's for the children who need the second dose. You can set up the follow-up date. And then reports could be printed up to follow-up for the second dose.

Tony DaSilva: Thank you Jeanne. If I had not set up this follow-up information you would likely see a large text field that would allow you to enter a free text up to 2000 characters. But since I did, that follow-up information displays here.

So now that I've entered my information I want to be sure to go back and logout. And then login as a PHA and then to confirm that information that I just entered. So I will login as a PHA.

And so I’m a PHA. I'm at the end of my reporting period and the deadline is approaching. And what I need to do is confirm all of my counts.

And just as we saw before I will click on Data Collection, click on Confirm Aggregate Report. I'll choose the details of my report here.

I'll make sure I choose the right one. I think it was 22nd of August.

Yes there we are. The two cases that I entered just a few moments ago display here. I think that's the previous one. Let me back out.

Jeanne Tropper: I think it was July 25.

Tony DaSilva: July 25, thank you. I got a lot of balls in the air here.

All right here we are. Here's our data entry. And as we saw before, a simple matter of clicking on the Confirm link. So I'm satisfied that all my information is correct.

I clicked on Confirm and my data entry is confirmed.

That brings me to the end of the Option 3 training. I want to step back to our configuration options just for just a moment, so we can close the circle on that.

Earlier I showed you how to enter a user and enter an organization. I want to now show you how to customize your data entry page to allow you to capture additional information above and beyond the standard required fields that are available to you.

I need to be a Public Health Administrator in order to do that. DES users do not have access to that functionality. And we do that here under the Event Configuration option.

So I'll click on Event Configuration. And the first thing I want to do is search for my event. I want to go ahead and search for the event that I've been working with. This called Novel Influenza. And I just need to enter a little bit of that filename.

Once the system finds my search I'll click on the event name. And I'm presented with the Edit Event page. You'll see a number of items here that are available to you but for our purposes here I want to focus on patient demographics.

You'll recall that I have patient identifier first name, last name, gender, and date of birth. If I wanted to capture some additional fields, a telephone number for instance I can do that here by clicking on the Configure Patient Demographic link.

I'm presented with the Configure Patient Demographics for Event Page. And you'll see on the left side of the screen I have a full complement of standard fields. And on the right side of the page I have all of the standard fields that I've selected for this particular event.

You'll notice check boxes associated with each of them indicating that these are required fields necessary for us to enter that information in order for us to save it.

So I'll just choose Home Phone and click on Add and that displays there. And if I choose Cell Phone and click on that, that will move over.

If I needed to make them required again I can click on either one of these check boxes to do so. And there's also a Preview button that displays, that gives me a rendering of how this would look to my users when they log in.

This is a simple rendering if there are any drop-down options that are not really available. They're simply here to give you some sense of what your user will see.

And when you're satisfied that you've entered all the field options that you want it’s just a simple matter of clicking on the Save button. Once we do that, the system tells me that my form has been saved.

And if I scroll down to Patient Demographics you'll see that the two fields that I entered display here. And we can see that from a user perspective by clicking on Data Collection and clicking Add Patient Countermeasures.

And if I choose my jurisdiction and events you'll see that the home phone that I entered and cell phone field I entered display here.

That in a nutshell is the process for adding some optional fields.

All of the tasks that I presented for you today are contained within the Online Help System. You access the Online Health System through the Help Menu Option and then Online Help.

If you've ever worked with online help before this system should be very familiar to you. It contains a tree-based menu of tasks, it has an index that you can display and also free text search option so you can enter that and display whatever contents that you want.

And that will give you an opportunity to read any of the procedures associated with the tasks that I’ve performed here today and all the other tasks that are available with CRA.

We have our additional documentation available to you as well. The Quick Reference Guides, those are going to be completed this week and be made available to you as well.

So please be sure to look at the Online Help now or the Quick Reference Guide if you find you have any issues.

Beyond that the CRA help desk is available to you. So they'll offer you any assistance that you need. If they cannot assist you they'll escalate your request.

That will first go through me. And if I can’t help you I'll find the appropriate development resource to make sure that we can solve whatever issues that you have. I'm going to log out of the system and turn it back over to Charles.

Charles Williams: [24]Thank you Tony. Okay so now we are going to conclude our presentation for today. And we just want to go over a few steps and our things to consider when preparing for tracking the vaccine doses administered.

First of all, for accessing CRA, some preparation activities include to acquire or renew your SDN digital certificate as necessary and then also used the CRA event name **Novel Influenza (H1N1) 09** for associated setup tasks within CRA.

And then also for logging into CRA we want you to use the address listed above to access the Secured Data Network. And then also access the CRA application from this SDN activity page.

Jeanne Tropper: And don't forget to able to identify who might be the DES Lite users. And so it will be a slightly different process that we identified earlier.

Charles Williams: [25]And then one consideration we would like to present. We presented it in other presentations and just want to remind you are just some quality control considerations for providers to provide aggregate reports.

The scenario is that a provider sends an aggregate count report, aggregate report to the Public Health Authority and then a need arises to add some counts to this already submitted report.

If a subsequent patient level reporting is received for a report that's already been submitted, then the Project Area, or you guys at the state level, need to reconcile the aggregate account so that these accounts are not double counted within CRA and also your IIS.

So again just realizing some type of quality control process so there is no double counting of counts coming in from a private provider.

[26]A few reminders. If you would like to again practice before actually using the application, you can access the CRA demonstration site at the address listed on the screen.

And then you can get contact the PHIN Help Desk at phintech@cdc.gov for your login and password to actually access this Web page.

And then also the CRA production site can be accessed at the end and should be used to perform the associated setup tasks which include adding organizations, assigning users to organizations and then assign an organization to the event which again is the **Novel Influenza H1N1 09** event.

[27]A few action items. There are still a few Option 1 users who have not submitted test files to Tony DaSilva. We have actually gotten a lot over the past week and there are still a few outstanding.

So if you could get those to Tony DaSilva at your earliest convenience at aod7@cdc.gov. And again this is for our Option 1 users; submit your test files as soon as possible.

Everyone begins to perform your setup tasks as necessary for your Project Area and this includes adding your organizations and users.
You're going to ensure that the users have an active SDN digital certificate as required and that those that will not be using the DESL or the data.

The DESLs so we don't keep tongue-tied. And those who will be using the DESL that the other process that we just went over today will be applicable for you guys to use for that.

And then also remember to develop your quality control mechanisms for Options 1 and 2.

[28]And then our resources that we have available; most of you guys have received these through emails the technical checklist for all options. And then you have the H1N1 aggregate data exchange specification. And this is mainly for our Option 1 users.

Then we have also sent out and posted our sample H1N1 Aggregate Report - Reporting form. These first three are also available already on our CRA Web page.

Our next resource is a guide for establishing CRA Data Entry Specialist Lite for H1N1. You guys should have received this in the announcement for today's Webinar. And we are in the process of getting it cleared to put on our Web page this week.

And then also our Quick Reference Guide will be available soon. As soon as they are available we will send them out. And these will be for our Option 2 and 3 DES and PHA users as well and synchronization.

[29]Our normal contact information, we have Jeanne Tropper who is our CRA lead, Warren Williams who is our informatics leads for the Immunization Services Division and then Charles Williams, myself who is the Project Area and public health partner liaison.

And then you can also send any questions that you may have to the CRA help@cdc.gov and I will receive that information as well.

[30]And then our final slide is just a listing of what's coming up.

We will continue our weekly conference calls Webinars. There may be Webinars or may be conference calls and then also training sessions if necessary.

And if there is some information that you feel need to be presented in these upcoming weekly calls and Webinars, please feel free to email me with this information and we'll make sure we have that for you.

[31]And so now we will open up for questions. And before we go to the phones we do have one that is already submitted for online.

And the question reads, "For Option 2 users is it required for the total doses for the age groups and the total dose for the dose number match?

We will do the best we can to make this match. But it will depend on the quality of data reporting from all vaccinators.

Will it be required to match in order to submit the data?"

Tony DaSilva: Yes it will be required to submit the data. CRA will not accept it if it does not match. Yes, someone just made a good point about the unknown option. You might not have seen that. I didn't bring that to your attention. I will do that next time that we have an opportunity to meet.

But there is an unknown option for the doses. So you want to make sure that if you don't have that information you can always enter information there.

Charles Williams: And so now we would like to open the lines for questions.

Coordinator: Thank you. We'll now begin the question and answer session. If you would like to ask a question, please press star 1. Be sure to unmute your phone as you will be prompted to record your name. To withdraw your request press star 2. One moment please for the first question.

Jeanne Tropper: And also please feel free to use the online.

No questions anybody?

Coordinator: I'm showing no questions at this time.

Jeanne Tropper: Well that means everybody is already. So we're really going to have a great showing, great anticipation.

Charles do you have anything else to add?

Charles Williams: I don't have anything else to add.

Thank you everyone for attending. And if you do have questions that you just did not share with us on the call, feel free to email any one of your CRA points of contact and we'll get your question answered.

All right thank you and have a good evening.

Jeanne Tropper: Thank you, bye-bye.

Coordinator: Thank you for participating in today's call. That concludes our call.

You may disconnect your line at this time.

END